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A REVIEW OF SPORTS GOODS CLUSTERS BY SWOT ANALYSIS: MEERUT CLUSTER IN PARTICULAR

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ABSTRACT

The sports goods industry in India has witnessed phenomenal growth over the past five decades and now occupies a place of prominence in the Indian economy in terms of its massive potential for employment generation and export. Indian sports goods industry is said to be the labor intensive and provides employment to the weaker sections of the society. However, it is threatened by several other factors such as scarcity of quality raw material, labour laws, poor financial support and import of cheap Chinese products which directly or indirectly affect the economy, employment and other benefits of the industry. The present study highlights the strengths, weaknesses, opportunities and threats of sports goods cluster of India as well as Meerut by using SWOT (Strength-Weaknesses-Opportunities and Threats) analysis and thereby providing some possible recommendations to overcome the weaknesses by its inherent strength and confront the threats by prevailing the opportunities.

KEYWORDS

Sports goods clusters, SWOT analysis.

INTRODUCTION

India is a home of several traditional sports such as kabaddi, kho- kho, pehlwani (wrestling) and gilli-danda etc. The British brought many popular sports in India including football, rugby, cricket, golf, tennis, squash, hockey, boxing, snooker and billiards etc. The modern Indian sports goods industry has its roots in Sialkot (today in Pakistan). After partition some of the artisans and craftsmen migrated to India and settled down in Jalandhar, Meerut and other towns of the country. Over the period of time these towns have been developed as the sports goods clusters. In the mean time these clusters have seen many ups and downs and now occupy a place of prominence in the Indian economy in terms of its massive potential for employment generation and export. The present study highlights the strengths, weaknesses, opportunities and threats of sports goods clusters of India as well as Meerut by using SWOT (Strength-Weaknesses-Opportunities and Threats) analysis and thereby imparting some possible recommendations to overcome the weaknesses by its inherent strengths and confront the threats by prevailing the opportunities.

SWOT ANALYSIS

SWOT analysis is a self appraisal tool used to identify the internal strengths and weaknesses of an organization. It also investigates its opportunities for growth and improvement and the threats the external environment presents to its survival. It is a popular and versatile tool, but it involves a lot of subjective decision making at each stage. The features of SWOT analysis are:

- It is elaborative enough to describe the organization's position against the contender.
- Identifies best future opportunities.
- Highlights current and future threats.

SWOT ANALYSIS OF SPORTS GOODS CLUSTERS IN NATIONAL PERSPECTIVE**STRENGTH**

Globally, the sports market is one of the most complex and diverse markets in which the government, federations and private sector are intertwined and all of them play an important role. Government policies directly or indirectly impact the development of sports in any country. However, these policies vary from country to country. Prior to 1990's, sports sector in China, one of India's major contender, was completely government funded, however, since then, there has been corporatization of sports. This has helped in professionalization of sports and improving sports environment in China. In India most of the sports goods manufacturing companies comes under the category of medium or rather small segment. The government has taken various steps to facilitate these industries in the following ways:

GOVERNMENT INITIATIVE

Recognizing the importance of sports, the Government of India has established various departments such as Sports Authority of India (SAI) for sports promotion and management. The Ministry of Human Resource Development (MHRD) was set up in 1985, with the objective of integrating efforts for development of human potential in the areas of education, women and child development, arts and culture, youth affairs and sports through its constituent departments. The government has also setup different institutions in this direction as under:

- Small Industrial Development Organization (SIDO) to assist the government in formulating and implementing its policies/programs/ projects/ schemes for MSME etc.
- National Small Industries Corporation (NSIC) to foster the growth of MSMEs in the country.
- Entrepreneurship Development Institute (EDI), to promote the entrepreneurial culture in the country.
- National Commission for Enterprises in the Unorganized Sector (NCEUS), constituted in 2004 for a period of three years to examine the problems of enterprises in the unorganized sector and suggest measures to overcome them.
- Ministry of Micro, Small and Medium Enterprises (MSME) to promote, develop and enhance the competitiveness of micro, small and medium enterprises.
- Small Enterprise Information and Resource Centre Network (SEIRC) to connect the entrepreneurs globally to the latest information base.
- Process cum Product Development Centre (PPDC), established in various cities of country with industrial significance e.g. Jalandhar, Agra and Meerut etc. to facilitate indigenous product development and enhancement.
- Sports Goods Export Promotion Council (SGEPC) to promote the export of sports goods from the various sports goods clusters of the country.

In addition to this, many more organizations are also working in this direction to fulfill the aspirations and requirements of the segment.

AVAILABILITY OF SKILLED LABOUR

According to National Productivity Council Report (2010), in general, 60 percent of the workforce is skilled while 40 percent is unskilled in the sector. This skilled labour constitutes the technically untrained artisans and craftsmen, working on the customary benchmarks.

GROWING YOUNG AND URBANIZED MIDDLE CLASS

According to Federation of Sports and Play Association report (2011), more than 1.2 billion people live in India and nearly half of them are less than 25 years of age. Due to continuous development in life style and the immigration of educated youth to the urban areas, the demand of fitness products as well as other sports goods has increased and this increased demand fosters the country's sports goods industry a lot.

WEAK BUT CONTINUOUS SPORTS PARTICIPATION

It is quite significant to highlight, on the basis of some consumer researches that many people are interested in purchasing sports clothing and sports shoes if they have the money, even if they don't practice sports. Growing disposable income and shifts in lifestyles, particularly in urban India, have also begun to change people's leisure habits and promoting more physical exercise, particularly through running and membership in fitness clubs.

CONTINUOUS DEVELOPMENT

According to the National Productivity Council Report (2010) and Dubey and Singh (2011), today, Indian sports goods manufacturers are exporting their products under their own brand names. India's share of the global sports goods exports has been growing manifolds.

CORPORATE INVOLVEMENT IN SPORTS

Many corporate houses such as Reliance industries Ltd., Sahara India, Vodafone, India Cement, Muthoot Finance, PEPSICO India, Hindustan Lever Limited, SS Sports, Nelco, SG Sports and BDM Sports etc. are sponsoring different sports activities, teams and players as well. It helps to strengthen the sports culture in the country, thereby directly or indirectly improving the health of sports goods industry.

OTHER STRENGTHS

- More than 100 years old industry with strong base of traditionally skilled man power.
- Abundant human resources at lower wages.
- Emergence of India on global manufacturing scene.
- Low overheads due to small scale production.

WEAKNESSES

Apart from the strengths, as mentioned in the above sections, the industry is also confronted with number of problems, constraints, handling hazards, limitations and rigidities as under:

WEAK NATIONAL SPORTS POLICY

The national sports policy states that the objective of broad-basing sports primarily remain the responsibility of the states and the central government. At yet, another level, a third set of key stakeholders, viz., the National Sports Federations, are neither within the jurisdiction of the states, nor the central government.

CONFUSING MINISTERIAL STRUCTURE

According to the study conducted by Mukherjee (2010), at the manufacturing and retailing end, there is no single ministry governing sports goods sector. Sports equipment falls under the jurisdiction of the Ministry of Commerce and Industry while sports apparel is under the Ministry of Textile along with textile, apparel and home furnishing, etc. Retail, on the other hand, is a state subject according to the Indian constitution and, therefore, state governments are the main regulatory authority.

WEAK RESEARCH AND DEVELOPMENT ACTIVITIES

The R&D in sports goods segment is really in the bad shape. No dedicated research center is established by the stakeholders to develop the new techniques, which could cultivate different sports goods clusters, for up gradation of existing technologies, materials and human resources, manpower planning, market development, equipment problem and other technical assistance etc.

POOR AVAILABILITY OF RAW MATERIAL

The sports goods industry widely depends upon the natural resources such as wood, cane, scrap and virgin metal etc. The availability of these materials depends largely upon the climatic conditions of the particular place where these are grown. Hence the fluctuating availability of raw material is a big problem for the craftsmen.

LACK OF FINANCIAL SUPPORT

Most of the small business entrepreneurs depend on traditional sources of finance such as personal or family sources or local moneylenders. Credit available through financial institutions is either availed by large entrepreneurs and the smaller ones are deprived of it due to illiteracy, lack of awareness, rector procedure required for obtaining loans or due to local petty politicking.

POOR INFRASTRUCTURE

National Productivity Council (2010) reported that most of the entrepreneurs are not satisfied with the quality of basic infrastructure of the cluster such as lack of adequate design centers, evaluation and demonstration facilities, services and feasibility studies, pilot plant trials, testing facilities, environment cleanliness including effluent treatment and disposal facilities. Absence of common facilities, non-availability of developed tool rooms and standards for ensuring quality and accuracy of the work/ product and proper storage and handling facilities etc. are some of the other factors. In addition to these factors erratic power supply is one of the major problems reported by most of the entrepreneurs during field survey (Garg, 2014).

OPPORTUNITIES

Rather, many factors that affect the performance of sports goods clusters are lying down still if given the right opportunity, the cluster can flourish. Some of the opportunities that Indian sports goods cluster can avail are as follows:

INCREASE IN PRODUCT DEMAND

Dubey and Singh (2011) and the field survey (Garg, 2014) have reported that the demand of sports goods have increased over the past years due to some of the mega events organized on the soil of the country such as Indian Premier League (IPL), Indian Super Football League (ISL), Pro Kabaddi League (PKL), Indian Tennis Premier League (IPTL) and Indian Hockey League (IHL) etc.

MEGA EVENTS

India has organized some mega events in the past five years such as Commonwealth games, Cricket World Cup, Formula one car racing, a series of IPL events, ISL and IHL events etc. These events not only motivate the youngsters to involve in sports professionally but also give oxygen to the sports goods artisans and entrepreneurs.

TECHNOLOGY UP-GRADATION

There are lots of opportunities for sports goods industry in up gradation of existing technology. The import of upgraded technology can be in the form of Foreign Direct Investment (FDI), collaborations and purchase of technology etc. Mega events are one of the major avenues for the identification of latest technologies. This opportunity can be adopted by various manufacturing houses.

INCREASE INVESTMENT

It has been reported by most of the entrepreneurs that the investment in the sports goods industry has been increased significantly over the past five years (Garg, 2014). Big corporate houses (like Reebok, Addidas and Puma etc.) have entered with heavy investment to exploit the young, energetic and mall culture fascinated Indian market. It could be a great opportunity for the Indian manufacturers to adopt their quality standards and the marketing strategies to rule the world as these big fishes are doing.

EMPLOYMENT ENHANCEMENT

Sports goods industry is labour intensive and could be a safe avenue for large number of artisans and craftsmen. If to take the instance of developed nations like USA, UK and Hong Kong etc., in spite of being sound technological base and automation, large work force has been absorbed by the sports goods clusters of these countries (Garg, 2014).

POLICY RELATED TO FDI

FDI will encourage the Indian manufactures a lot to sell their products in the highly competitive and quality oriented international market because the FDI will come with some good management practices and latest technological know-how.

RETAIL OUTLETS

Some of the financially and technologically sound sports goods manufacturers of India can collaborate with the big giants (like Reebok, Addidas and Puma etc.) to setup a retail chain of indigenously make products and can establish a brand India.

OTHER FACTORS

- Large and expanding domestic market.
- Increase in demand due to rise in the disposable income and capacity to spend by the domestic consumer.
- Growing confidence, of both domestic and international buyers, on the Indian sports goods.
- People are more health conscious now than ever.
- Achievements of Indian sports persons increasing the awareness and popularity of sports in India.
- Overseas buyers are looking for alternate source of supply instead of heavy dependence on one country.

THREATS

Although India has improved a lot in manufacturing sector, over the past years, still sports goods sector is estimated as the niche segment and facing several threats on international and domestic fronts as under:

THREATS AT INTERNATIONAL LEVEL

Despite, achieving significant growth in exports, India contributes just one percent to the global sports goods market. On the other hand, India's import of articles and equipments for sports is an alarming factor for Indian sports goods industry. The sports goods import from China and Taiwan are increasing at a rapid pace. Although these countries do not have skilled labour base but the bigger source of threat is their high production capacity at the cheaper price tags due to high mechanization.

GOVERNMENT RELIABILITY ON FOREIGN BRANDS

The government and different sports federations are the major buyers of sports goods in India but their inclination towards foreign brands is a threat for domestic manufacturers. Sports goods imported by the government are exempted from import and other duties. With the advent of corporate retailers/ big brands, many of them directly work with government and /or federations. This cut down the benefits of Indian sports goods manufacturers.

TAXATION AND LEVIES

According to Garg (2014) most of the entrepreneurs are not happy with the taxation policy of the government. They feel that taxes are very high and should be cut down so that Indian sports products could be competitive in the global market.

PENETRATION OF GLOBAL BRANDS

Some studies highlighted that multi-brand retailers like 'Planet Sports' and big brands like Nike and Reebok have focused on school children as a big market for sports products. They are working with the mindset that if these children like a brand, it will stay with them throughout their life. Brands have come up with competitive pricing strategies to get business from this segment. It will hit the benefits of Indian manufacturers in the long run.

HIGH LOGISTIC COST

In India, the logistic chain is highly fragmented and is marked by the presence of a large number of intermittent. Delay in transportation, requirement for multiple documentations at state borders increases the costs of inventory being transported. India spends approximately US\$30-40 billion more than it should on logistics due to inefficiencies in the system (Garg, 2014). It is also estimated that approximately 14 percent of a product's cost represents logistics-related cost.

POOR AVAILABILITY AND STORAGE FACILITY

Import barriers such as delays and cumbersome custom clearance process, inadequate warehousing facilities at airports and harbors, bribes and corruption can also be considered as the threat for Indian industries including sports goods sector. Sudden and unplanned shortage of raw materials can lead to non-availability of goods at the retail end.

STRINGENT LABOUR LAWS

Most of the units in sports goods sector are small and medium enterprises having limited production capacities. They are unable to serve the requirements of buyers in case of large orders to be delivered in a time bound manner. Since such orders are not regular, manufacturers are wary of increasing their capacities due to stringent labour laws.

POOR MARKETING PRACTICES

In the small scale industry one of the vital obstacles of development is the existing system of marketing and distribution of products. Presence of middlemen/agents as the intermediaries is problematic, especially for tiny business entrepreneurs. Inadequate market awareness is another problem faced by the small businessmen, which reduces the foreign exchange earning capacity of the industry.

DECLINING GROWTH OF UNITS

As per Dubey and Singh (2011) and the field survey reports (Garg, 2014) most of the manufacturers reported that there is a large competition in the market and the major threat is the penetration of cheap Chinese sports goods in the Indian urban as well as sub-urban markets. It declines the growth of Indian manufacturers.

OTHER FACTORS

- Low consciousness on international safety and quality standards.
- Introduction of high tech materials (graphite and composites etc.) and latest technology by international manufacturers.
- International brands gaining popularity in India.
- Market is vast and targeted only for low and lower middle income groups.
- Breakage of raw material in transportation.

SWOT ANALYSIS OF SPORTS GOODS CLUSTER OF MEERUT

Meerut sports goods cluster is spread across a radius of approximately 10 km. The cluster produces a large range of sports goods and about 60 percent of the total production is being exported to Australia, South Africa, England, America, West Indies, New Zealand, Zimbabwe and Bangladesh etc., and the remaining products are sold in the domestic market across India. An attempt has been made to analyze the Meerut sports goods sector with the help of SWOT analysis a under:

STRENGTH

Sports goods cluster of Meerut is one of the ancient, prominent and established clusters of India. It has certain strengths as:

CLUSTER LOCATION AND INFRASTRUCTURE

Meerut is an industrial city located in the close vicinity of national capital Delhi. Due to this it is facilitated with all the basic infrastructural requirements such as transportation, connectivity with the national road network and a vast market to sell the sports goods produced in the cluster.

GOVERNMENT INITIATIVE

As discussed in previous sections government has taken various steps to promote Meerut at the international map of sports commodities by establishing Directorate of Industries office, Process cum Product Development Centre (PPDC) to provide latest testing and product development facilities to the entrepreneurs and many other offices and financial assistance centers. Government has also offered certain incentive schemes to the exporters of sports goods.

EMPLOYMENT GENERATION

The cluster provides employment to the weaker section of the society; particularly the craftsmen belong to schedule cast community. The segment is highly labour intensive, due to low mechanization; hence there is a vast scope of handmade articles, which could be prepared easily in any household or cottage industry. It is also beneficial to the physically constrained people as well as female workers. Low investment is also a point of attraction to the below poverty line (BPL) families. It has become a good source of income and they can smoothly run their living hood.

CAPABILITY OF IMPARTING QUALITY WITH IN LIMITED RESOURCES

According to field survey, cricket accessories manufacturing units in Meerut are relatively better organized and give more attention to quality within the confined and constrained resources. Quite a few industry export substantial volume to all over cricket playing countries in the world and have established their brands such as SS, SG, SF and BDM etc. Some units produce standard quality goods in large quantity using continuous/ semi-automatic process.

FOREIGN CURRENCY GENERATION

Meerut sports goods cluster generates substantial amount of foreign currency by exporting its products. It is estimated that this figure is approximately Rs. 125 Crores per annum (Garg, 2014).

HIGH WORKMANSHIP

The field survey (Garg, 2014) estimates that 80 percent of the industry depends on labour and rest on the machines. The craftsmen are skilled enough to produce quality product manually against the predefined benchmarks. Hence the sports goods cluster of Meerut is found to be highly labour intensive.

AWARDS AND HONOURS

According to the news reported by hindi daily 'Dainik Jagran' (9th April 2012), Meerut based sports goods companies have been honored by three brand promotion awards out of five in the award ceremony organized by Sports Goods Export Promotion Council (SGEPC). The sports city has proven its determination for excellence again, in the field of cricket sporting goods, table tennis and athletics products etc. Further the cluster has won total of 21 awards out of 81 in different segments.

OTHER FACTORS

- Handmade products.
- Easy availability of skilled labour in and around the cluster.
- A state of the art sports goods complex equipped with all facilities.
- Strong presence in the local market.

WEAKNESSES

Sports goods cluster has certain weaknesses as under:

UNORGANIZED STRUCTURE

Total number of units estimated in the cluster is approximately 3350 out of which 1250 are registered and 2100 unregistered enterprises (Garg, 2014). These large amounts of unregistered units are fragmented in Meerut and neither comes under the control of government nor any other agency. Most of the workers associated with these units are unskilled and daily wage workers. These units produce sub-standard products for the sub-urban as well as rural markets.

SCARCITY OF RAW MATERIAL

Garg (2014) identified that cluster faces many hurdles in procuring some of the other essential raw materials such as rubber, cane, threads and steel etc., for manufacturing of various sports equipments. Though raw materials are available within the country yet it can't be easily transported from one state to another due to interstate restrictions in goods movement.

CHILD LABOUR

The exposure of child labour, engaged in sports industry of Meerut city and its surrounding regions, was first highlighted by an Indian NGO, Bachpan Bachao Andolan- BBA in 2009 under the supervision of Kailash Satyarthi (Noble Prize Winner 2014). It has been viewed that big companies outsource work to small contractors, who take unfair advantage of the poor in villages and small towns, who then employ young children to churn out footballs and other sports gears at the cost of their health and education. Children as young as six are employed in the football-manufacturing industry right across the city and adjacent villages.

FRAGMENTED STRUCTURE

As per the statistics collected by Garg (2014), there are around 3350 sports goods manufacturing units in Meerut which are fragmented from urban areas like Sports complex, Delhi Road, Mohkampur, Suraj Kund Road, Victoria Park, Jail Chungi and Lal Kurti etc. to the villages around it namely Abdullahpur, Jangethi, Mohkampur, Nai Basti, Maliyana, Partapur and Daurala etc.

CONVENTIONAL MANUFACTURING SYSTEM

Only a handful of enterprises in the cluster are able to tape international brands while most enterprises cater to the less sophisticated domestic market or the low-end export market. The major reason identified behind this weakness is technological stagnation and availability of manually skilled labour.

LOW AUTOMATION

According to survey conducted by different government agencies and Garg (2014) the automation in the sports goods cluster is as low as 0% in the field of stitching of football and maximum upto 40% in the athletic items manufacturing and sports- wear etc.

LACK OF PRODUCT DEVELOPMENT

Majority of the sportsmen are of the opinion that the sporting gazettes should have great strength but light weight. Graphite shafts in golf sticks, fiber glass in skis, different types of polymers in basketball shoes, PU (Poly Urethane) in inflatable balls, kevlar in sail boats and hockey sticks, etc. are some of the examples of latest material used in western countries. Research on some of the other alternate materials is under progress.

Small and medium enterprises are the back bone of sports goods cluster of Meerut. These units can not invest in the development of alternate materials in such a fashion that the international giants can. Poor initiation of government as well as technological institutes in R&D of such a material and equipment designing are also one of the major drawbacks.

DEPENDENCE ON IMPORT OF QUALITY RAW MATERIAL

Raw materials like wood, cork, cane willow, fine grade plastic and leather form the basic inputs to the production of sport goods. Sports goods cluster heavily depends on import either due to non-availability or rather low quality of available material. Changing consumer's requirements and demand for sophisticated equipments is catered only by the imported raw material.

LOW INCLINATION TOWARDS INTERNATIONAL QUALITY STANDARDS

AS reported in previous sections, a big segment of the units are unregistered and are working as the sub-contractors and supplies their products to the low standard sub-urban or rural markets. That is why they are less quality conscious. Most of these enterprises rather don't know about the national/ international quality standards.

UNSATISFACTORY FINANCIAL ASSISTANCE

It is expected that some segments (fitness products, athletic products, table tennis, health equipments and cricket goods etc.) of sports goods would perform well in the near future. But to cater this high demand the cluster should be well prepared with it's all the recourses. Capital is one of the major issues particularly for small as well as micro scale industries. The small unit holders complained that they don't have sufficient fund to fulfill even a fraction of demand if added in the market. They are manufacturing goods for big brands. Banks and other financial agencies do not look at them but always ready to finance the big enterprises.

LABOUR LAWS AND REGULATIONS

According to the Department of Industrial Policy and Promotion report (2011), the labour laws are also creating problems for small and medium enterprises. Since the manufacturing units require employment of casual workers for short periods, depending on orders/demand. The labour laws need to be made more flexible for undertaking such engagements.

POOR RESEARCH AND DEVELOPMENT

There are very few enterprises in the cluster who are engaged in the development of new products to meet out the international challenges. Though, these units are enthusiastic enough to develop better products but on the basis of very few technically skilled persons. That is why they are not able to communicate their research effectively to the world. Piracy of this development is another hurdle.

LACK OF INDIGENOUS BRANDS AND MARKETING STRATEGIES

Sporting goods market is relatively small and split into several layers. The organized segment of the market is confined to the limited companies such as BDM, SG, SS, SF, Nelco and National Sports etc. These companies have been stepped up their investments but most of the small enterprise faces several problems including the market risk bearing capacity. That is why these small players focus their production either for international brands or for the low-end domestic market, rather than establishing their own brand.

DISPARITY IN SPONSORSHIP

It is the social responsibility of indigenous corporate houses to come forward to support the young and evolving talent in sports. It not only enhances the sporting culture in the country but also encourage the budding sports persons to perform at their best at national and international levels. But unfortunately these houses show more affinity towards established players and the glamorous mega events such as IPL, ISL, IHL, IPTL and IKL etc.

OTHER FACTORS

- No space or vision to organize cluster oriented trade fairs.
- Red-tapism and slow working in government departments.
- Fixed mindset to sell only in the domestic market.
- Erratic power supply and other infrastructural shortcomings.
- Weak association and union.
- Poor working conditions.

OPPORTUNITIES

Meerut sports goods cluster is labour intensive and has highly skilled labour. Willingness to continuous improvement within the limited resources its unique selling propositions. These are some of the factors that could bring some good opportunities for the entrepreneurs as:

INCREASE IN PRODUCT DEMAND

Garg (2014) has explored that the demand of sports goods has increased over the years because of the adoption of sports as a full time career option by most of the youngsters. The present academia is also associated with the overall development of the students and sport is one of its vital components.

PRODUCTIVITY IMPROVEMENT

Productivity improvement in sports goods cluster has a vast scope. It will not only increase the size of the industry but also the employment opportunities. The cluster can be benefited immensely if a proper technical up-gradation of machines and equipments etc. is done. Ministry of Micro Small and Medium Enterprises (MSME) in order to enhance productivity of Indian industries, started 'Lean manufacturing competitiveness technology program' with the help of Government of Japan. According to this scheme only 20 percent of the total expenditure would have to be borne by the enterprise and rest by the government.

EFFECT OF MEGA EVENTS ON SPORTS GOODS CLUSTER OF MEERUT

Meerut has given many sports stars to the national teams. Raman Lamba, Praveen Kumar, Bhuvneshvar Kumar, Sudip Tyagi, Karan Sharma and Seema Puniya are some of them. It is the influence of mega events such as IPL, ISL and IKL etc. that today the youngsters are exploring their career in the sports and motivate others to sail in the same boat. This culture not only increases the inclination of young players towards the quality oriented sports goods but also provides an opportunity to the manufacturing units to produce world class sporting goods.

EMPLOYABILITY ENHANCEMENT

Garg (2014) has taken the reference of The Economic Times (22nd August 2012) and the report of ASSOCHAM (2012) which states that the employability in Meerut has increased by 38.5 percent, in the recent years, as compare to 23 percent in the same tier cities. The report also highlighted that the job market is expected to be boomed by 50 percent in the coming years as large number of retail outlets including sports goods would register their presence.

FINANCIAL ASSISTANCE

The field survey conducted by Garg (2014) says that about 28 percent entrepreneurs have taken bank loan facilities to establish and expand their businesses. The trained entrepreneurs are now stepping into the segment and availing all the facilities offered by the government time to time to establish or expand their existing facility.

OTHER FACTORS

- With the advent of information and communication technologies new products and designs can be made available easily.
- New machines and tools are now available to financially sound units.
- New products for higher income groups can help in creating new market.
- Some of the Indian brands have enough potential to expand their market horizontally and vertically.
- Potential for product diversification.

THREATS

Today's market is highly dynamic and quality oriented due globalization and social as well as economic reforms made by the governments over the past two decades. This not only increases the market size but also enhance the competition in the market. The sports goods cluster of Meerut has also not remained untouched and is confronted with the following threats:

TRADE COMPETITIVENESS

Among two major sports goods clusters of India-Jalandhar and Meerut; Jalandhar contributes approximately 75 percent where as rest is contributed by Meerut. Due to confined proportion, Meerut cluster is more threatened by Asian counterparts like Japan, China, Taiwan and Pakistan etc. It pays comparatively high tariffs as compare to Pakistani city, but with moderate productivity. Chinese and Japanese companies are more technologically advanced as compare to traditional Meerut cluster.

PENETRATION OF GLOBAL BRANDS

The growing Indian retail market, consistently high GDP, rising per capita income, large consumer base has attracted many foreign brands including sports goods segment to India, especially the brands of developed countries, which are facing a saturated market at home. Both traditional and modern retailers have pointed out that the Indian manufacturing sector has not focused on strong brand development (Garg, 2014). There are only a few Indian brands and hence they have no options but to purchase foreign brands.

PIRACY

It has already been reported through various mediums that very few entrepreneurs have strived towards branding of their products like BDM, SS, SG, HRS, Nelco, Anand Track and Field Equipments and Bhalla International etc. Still many small and medium manufacturing units market their sub-standard products with big names and earn the handsome profit. During field survey conducted by Garg (2014), almost all the local giants' complaint that it is due to the wobbly government regulations towards the check of piracy.

PRICE HIKE IN INDUSTRIAL LAND

Garg (2014) has taken the reference of prominent English daily, The Times of India (24th March 2011) that the escalating land prices have frozen the plans of expansion of many small scale industries in Meerut and nearby places. It has affected the chance of many companies, who are doing reasonably well and are engaged in the production of sports goods with full capacity, could not expand their facilities due to costly industrial land hence facing the stagnation problems.

POOR QUALITY SYSTEM

Perhaps, it is the most neglected area of this industry. Having laboratory and carrying out quality control check is exception (very few units have). Practically, there is no check for incoming raw material. However, some cursory check with finished product is carried out-mostly visual, weight and sometime hardness by some units. PPDC offers some of the testing facilities to the manufacturing units but very few of them are interested to do so because their sub-quality products are sold in the market without hassle.

TECHNICALLY SOUND HUMAN RESOURCE

Equally neglected area is the recruitment of qualified technical manpower. PPDC, Meerut offers the polymer technologist course and the young ones do it with full enthusiasm but after the completion of their course they found limited scope for them in the present industrial culture. So they migrate to other industrial towns like Gurgaon, Noida and Ghaziabad etc. for their livelihood. Hence there is hardly qualified Polymer Technologist (PT) in the industry, especially in the middle level like supervisor and lab chemist etc., who could follow proper processing and technology required for the manufacture of the product.

SOME DISCOURAGING ELEMENTS

In spite of having various factors of enthusiasm, some discouraging elements are still prevailing among the entrepreneurs like lack of financial support by the banks as they demand lots of formalities, limited demand of products because big brands and cheap Chinese products are capturing most of the sports goods segment such as fitness products, by-cycling etc., low returns on the investment to the artisans and small entrepreneurs etc.

RECOMMENDATIONS

By referring above sections it could be recommended that:

- Government first strives towards organizing the fragmented sports goods cluster of Meerut.
- Improved infrastructure and lenient government regulations.
- Government should instruct all the financial institutions, come under their control, to provide financial assistance to small entrepreneurs at minimum formalities.
- Poor R&D activities stagnate the product development. Government, in association with technological institutes of national repute viz. IITs and NITs, can fill this gap.
- One of the Government of India initiatives, PPDC has to become more vigilant to train the technically untrained but manually skilled labour of the sports goods cluster.
- Brand and quality consciousness have to be developed among the entrepreneurs by the competent agencies to meet out the local as well as international challenges.
- A warehouse should be established by the government to store the scare raw material during its high time and can be distributed among the industries according to their demand during lean period. This can also be used to store the finished goods. This practice can be adopted on the cooperative basis.
- Government should promote the lean manufacturing technology and motivate the manufacturing units to adopt it in order to increase the quality of the product as well the productivity of the manufacturing facility.
- Government should develop SEZ or dedicated industrial area for sports goods cluster of Meerut so that all the facilities can be made available within a premises.

CONCLUSION

It could be concluded that sports goods cluster of Meerut, in spite of having small segment, has a significant contribution in the economy of not only Meerut but also the nation. It is a labour intensive industry and should be emphasized more to enhance the employment opportunities. Different non-traditional avenues have also been explored in the study. Recommendations on the basis of SWOT analysis have been made. If these recommendations are materialized by the combined effort of different stakeholders of the cluster it would definitely write a script of remarkable success one day.

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